
THE BASIS AND CONTEXT FOR MARKETING

Marketing in Library and Information Science: A Selected Review of Related Literature

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SUMMARY. Marketing is defined by Philip A. Kotler (1975, 5) as the analysis, planning, implementation, and control of carefully formulated programs designed to bring about voluntary exchanges of values with target markets for the purpose of achieving organizational goals. He expands on his definition to include what had commonly come to be known as the marketing mix—price, product, place and promotion. This “mix” has been both adapted and expanded for Library and Information Science (LIS). Marketing in LIS should be accepted as one of the functions of a manager included in POSCORB (Planning combined with marketing, Organizing, Staffing, Coordinating/Controlling, Reporting and Bud-

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geting) and as a management philosophy. This review explores the gradual development of its changing applications usually including only parts of the marketing mix (promotion and public relations) in the 1980s, then moving to a more expanded use of marketing in the latter portion of the 1990s and into the 21st Century. Relationship marketing and usability studies from the Human Computer Interaction (HCI) side of information technology are discussed for incorporation as well as the literature that supports the fact that marketing and planning (usually strategic planning) come with many benefits but not without cost; that cost is change. [Article copies available for a fee from The Haworth Document Delivery Service: 1-800-HAWORTH. E-mail address: <docdelivery@haworthpress.com> Website: <<http://www.HaworthPress.com>> © 2002 by The Haworth Press, Inc. All rights reserved.]

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BACKGROUND

In a conceptual sense, librarians have used some aspects of marketing for many years but with different terminology than the for-profit sector. The introduction of reference services (a product) to improve library effectiveness (Green, 1876; Rothstein, 1961), and the establishment of branch libraries to fulfill the needs of various disciplines and departments in a changing environment are two such examples. Some facets of marketing were used early on the professional level as well as with the use of segmentation. Segmentation is a marketing strategy that groups customers into segments, where they will be most receptive to a particular product. One of the first of these was the recognition that there was a need within the American Library Association (ALA) to establish a division specific to the needs of academic librarians—thus the founding of the Association of College and Research Libraries—the ACRL (Holley, 1989), with other similar divisions to follow such as the Public Library Association (PLA) and the Special Library Association (SLA). Other uses of segmentation included the establishment of library public services and other specializations of different types of services to fulfill needs and desires of special populations.

O. Gene Norman (1989) credits a portion of the expansion in the use of marketing from the profit to the non-profit sector to the publication of Philip A. Kotler's *Marketing for Nonprofit Organizations* (1975). A

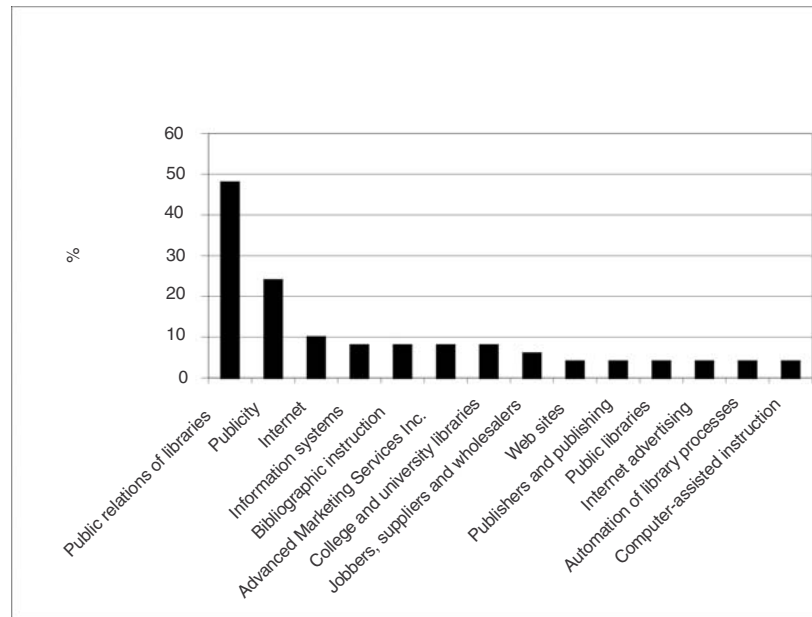
more specific influence on LIS has been the 1979 White House Conference on Libraries which espoused training in marketing for librarians (1980); Darlene E. Weingand's *Marketing/Planning Library and Information Services* (1988) and Elizabeth J. Wood's *Strategic Marketing for Libraries: A Handbook* (1988); and her later article with Bonnie Gratch Lindauer "Strategic Planning: Implementation and First Year Appraisal at Bowling Green State University," (1991). Also influential for the application of marketing in LIS has been the ubiquitous spread of technology, so much so that the influence is perpetuating new marketing approaches (McKenna, 1991).

What was true with marketing in the private sector held true in the non-private sector as well; there were misunderstandings. With the publication of "Marketing Myopia" in the *Harvard Business Review*, Theodore Levitt (1960) cited the classic example of the misunderstanding of the railroad companies who thought they were just in the railroad business, when, in fact, they were in the transportation business and, as new technologies came along, they didn't see them as part of their mission. That misunderstanding nearly led to the demise of the railroad system at the time.

A recent search of some 920 articles in *Library Literature* indexed under "marketing" reveals misunderstandings of marketing as well. Marketing was misunderstood by librarians to mean primarily "promotion and public relations," which is only a small portion of the marketing mix (product, price, place, promotion) with public relations being a subset of promotion. For the years 1990-1995, the majority, fifty-five percent (55%), of the articles were on publicity and fifteen percent (15%) were on public relations for a total of seventy percent (70%) of all articles. For the years 1996-2001, public relations represented forty-eight percent (48%) of all articles published and publicity represented twenty-four percent (24%), for a total of seventy-two percent (72%) of all articles published for those years (see Tables 1 and 2).

In terms of types of libraries (academic, public, school, and special) represented in the 920 marketing articles, academic libraries comprise the largest percentage. Nine percent (9%) of the articles published were on Bibliographic Instruction (BI) and nine percent (9%) were indexed under college and research libraries, for a combined total for academic libraries at eighteen percent (18%), while public libraries represented five percent (5%) of the articles. Earlier in the 1990-1995 articles, college and research libraries represented five percent (5%) of the articles, and corporate and school libraries represented three percent (3%) each. Clearly, the majority of the articles indexed under

TABLE 1. Library Literature Results on Marketing—Years: 1996-2001

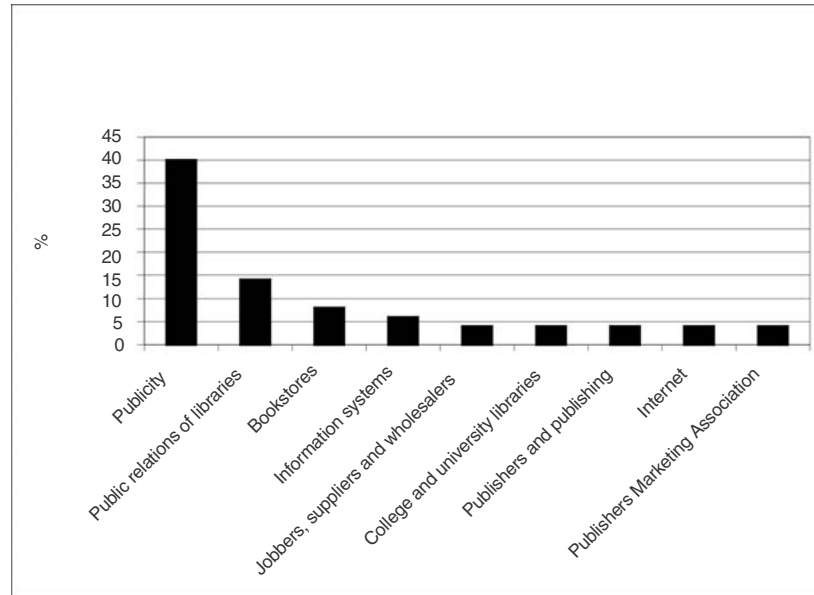


marketing relate to promotion and public relations, only one aspect of the marketing mix (price, place, product and promotion).

THE CONTEXT FOR MARKETING IN LIS

Lyndall Urwick and Luther Gulick (1937), in a paper to U.S. President Franklin Roosevelt, introduced POSCORB (Planning, Organizing, Staffing, Controlling, Reporting and Budgeting) as the functions of a manager. These functions have remained a mainstay in traditional management literature and in practice (Kotter, 1990). By definition, marketing is a part of the planning process, currently more applicably designated as strategic planning due to the assumption that an organization in today's Information Age is a dynamic and changing environment. Historically, the approach of linking strategic planning and marketing together was begun as one of the planning strategies utilized in the United States during World War II and continued due to the economic growth that followed (Steart and Moran, 1998).

TABLE 2. Library Literature Results on Marketing—Years: 1990-1995



Note: Percentages for these charts are based on the percentages of each group in all sources, where some sources may apparently appear in more than one category based on the outcome of all of the percentages (in some categories more than 100%).

Another influence on this combined approach was the Harvard Business School's method of emphasizing overall corporate strategy by defining strategic planning as an entity that combined production, finance, and marketing (Porter, 1987). Marti Cox (2002) states that the combining of planning and marketing (including market research methods) was a mechanism to cope with change and help predict the future. Darlene Weingand (1998, 2) argues that "placing marketing within a planning framework is rooted in the need to make decisions within a logical, organized structure that has been developed with input from the community." J. Powers (1995, 479) writes similarly, that through focusing marketing activities within a planning framework, "a library can define and transmit its image, philosophy and mission within the organizational culture to create a dynamic process of informational exchange."

This integrative approach is well-represented in LIS literature including such titles as: *Marketing/Planning Library and Information*

Services (1999); *Planning and Marketing* (2000); *Using Future Trends to Inform Planning/Marketing* (1995); *Planning Through Marketing* (1991); *Strategic Planning, Marketing, TQM* (1997); *Marketing with a Capital S: Strategic Planning for Knowledge Based Services* (1998); *Marketing/Planning for Maximum Effectiveness* (1991). Also helpful to this process is Darlene Weingand's diagram of the marketing/planning process (1998, 4).

Weingand further developed her thinking in marketing for libraries in her book, *Future Driven Marketing*, her premise being that marketing should be future driven:

$$F (m + p) = M$$

Again her focus on futuring plus marketing and planning equals the big M (marketing). Her term "futuring" centers on the identification of possible futures, with the intent of working toward the one that is preferred. Futurists, she writes, are those who care about the future and who develop strategies that help in identifying possible futures within the marketing mix (Lucille Gordon, 1989 and Kim Long, 1992). Prior to those applications, information should be known about the process itself. Such information includes writing a marketing plan (Kassel, 1999) and conducting a marketing audit (Weingand, 1998; Cram, 1995; Wakeley et al., 1988).

THE MARKETING MIX

Marketing is the analysis, planning, implementation, and control of carefully formulated programs designed to bring about voluntary exchanges of values with target markets for the purpose of achieving organizational goals. (Kotler, 1975, 5)

Philip Kotler (1975, 6-7) expands on his definition of marketing to include what has commonly been referred to as the "marketing mix." These amendments include: (1) marketing is defined as a managerial process involving analysis, planning, implementation, and control; (2) marketing manifests itself in carefully formulated programs, not just random actions to achieve desired response; (3) marketing seeks to bring about voluntary exchanges of values; (4) marketing means the selection of target markets

rather than a quixotic attempt to win every market and be all things to all [people]; (5) the purpose of marketing is to achieve organizational objectives; (6) marketing relies on designing the organization's offering in terms of the target market's needs and desires rather than in terms of the seller's personal tastes; and (7) marketing utilizes and blends a set of tools called the marketing mix-product design, pricing, promotion, (or communication), and place, or (distribution).

Over the years, the marketing mix has been addressed by different authors who have taken a different attitude toward its composition. The basic marketing mix is often nicknamed the "4Ps"—product, place/distribution, pricing, promotion, and can be expressed in more customer-oriented terms as the "4Cs"—customer value, cost to the customer, convenience to the buyer, and communication (Dibb and Simpinkin, 1994). In essence, the marketing mix places the customer at the center of the organization and helps to fulfill the mission of the organization.

Weingand (1998, 2) has modified the four Ps—Prelude and Postlude—to accommodate the marketing audit (Prelude) and evaluation (Postlude). These additions first appeared in an earlier work of hers, *Marketing/Planning Library and Information Services* (1987).

THE MARKETING MIX APPLIED TO LIBRARIES

The marketing mix is an organizational framework appropriated to think through all the necessary marketing decisions. Darlene Weingand (1998, 2) has conceptualized the 4Ps which make up the marketing mix as they relate to libraries:

Product = Those programs and services that the library provides to its customers.

Price = What it costs to produce its product, plus any user fees that are assessed.

Place = How products and customers (or patrons) are connected; distribution channels.

Promotion = How the library communicates with its customers, relating details on how customer needs have been identified and what responses have been developed to meet those needs.

Product

Product in LIS is defined broadly as programs and services that the library provides to its customers. These products and services can be myriad and are continuously being produced. The first product the library delivered could be thought of as reference services (Galvin, 1978), but under closer scrutiny an earlier product may be identified. In the not-for-profit sector, "product" often involves re-packaging products. In an organizing sense, the library buys books and periodicals and through processing "repackages" (classifying and cataloging) those materials so they can be retrieved based on user needs and wants. On a broader scale, these materials make up a further "product" consisting of materials based on collection development policies and on curriculum and research needs and desires. Often these collections are general or may become specialized based on the mission, needs, and/or wants of a given library or information center. Such specialized collections, as products, include collections to support specific areas of study, such as women's studies (Conway, Gonder and Butler, 1995; Faries, 1994; Miller, 1993); African American studies (Pyne, 1994; Rochman, 1997); Hispanic studies (Dorn, 1992; Dresang, 2000; Hazen, 1997); Native American studies (Day, 1997; Norton, 1993; Roy, 1997); and Asian studies (Shulman, 2002; Nye and Magier, 2000; Doll, 2000), to name a few examples.

Still another angle on the meaning of product is offered by marketing professor John Workman in an interview with Chris Le Beau (1999, 3) who explains: "I view product as something encompassing both the physical object potentially, but also the services that accompany the product." Taken in this light, it is understandable why in LIS literature there are any number of sources that address reference service (a product) (Bopp and Smith, 1995; Katz, 2002), but also those literatures which address the effectiveness of that service. Included are such titles as: "Performance Measurement Matters When Evaluating the Effectiveness of Reference Services (1988); Research in Reference Effectiveness (1994); and "Assessing (i.e., Assessing) the Effectiveness of Reference Services: A Difficult but Necessary Process" (1988), to cite just a few. The same argument holds true for separating and evaluating other products/services including online catalogs (Speigel, 2000; Long, 2000; Carlyle, 2000); Web sites (Beaudin, 2001; Milbury, 2001); and other products/services. The place of product in the marketing definition is another important aspect. Dianne Strauss (1988) says that in discussing product we must return to the "exchange portion" of the

marketing definition. For it is in the product that we seek the community's use of library services and we also seek the community's approval through good will and financial support. In exchange, the library must return to the community the best possible response to their needs within the scope of available resources.

Price

Since monies paid for services come indirectly in LIS (taxes, fees, tuition, etc.) and not directly from users, the term "cost" is more appropriate than price. Such an approach might raise such questions as: Do your users perceive the value that you are providing? Are they willing to make their opinions known to the people who control the purse strings? (John Workman quoted in Chris Le Beau, 1999, 2). Indirect costs do not suggest, however, that LIS should not be involved in the "pricing" aspect of marketing; quite the contrary, there may be a greater need to be involved, so that libraries may more accurately defend and be accountable for funds spent and products rendered to their community of users.

To assist in this process, cost-benefit analysis is recommended (Weingand, 1998, 96-111). Cost benefit analysis (CBA) has been used in the for-profit sector for many years as a means of measuring productivity. CBA is a methodology in which all potential gains and losses from a proposal are identified, converted into monetary units and compared on the basis of decision rules to determine if the proposal is desirable. In essence, CBA is a measure that helps determine how the benefits of a product or service compares to its costs. There are three common models of CBA: the Return on investment (ROI), present value analysis, or payback period. ROI models determine the amount of profit, or return, a product or service provides and compares this figure to its cost. Present value analysis models compare the cost of the product or service to its future estimated annual rate of return. Payback period models look at how long it will take before the profit or return pays for the cost of the product or service, and compares this time period to the estimated life of the product or service. There may be some applicable parts of this process for LIS, but there are also problems (White and Crawford, 1998, 1-2).

There are several drawbacks in applying any of these models to libraries. First, most libraries are not-for-profit organizations. All three of the CBA models rely on the use of the return or profit the product generates. Second, the benefits that arise from products or services in libraries are usually not quantifiable.

So what evidence do libraries have at this time regarding CBA's relevancy to LIS? An earlier analysis of literature by Colin K. Mick (1979) found that most studies have focused on collections and staffing. Mick divided the studies he found into four types: (1) those that study a function or service, (2) those that look at the organization, (3) those that examine the structure within which the library is located (university, town, or corporation), and (4) those that compare costs across similar types of libraries. A. Craig Hawbaker and Cynthia K. Wagner (1993) conducted a CBA comparing the costs of providing full-text access to two full-text business databases (Business ASAP and Business Index) with the cost of owning or subscribing to the periodicals included in these sources. They found that providing access to both indexes increased access from the 242 periodicals to which their library subscribed to 513 periodicals at a cost increase of approximately 15 percent. The issue of increased cost over increased access is a critical one in light of the fact that in today's libraries the amount of materials a library has access to is more important often than the amount of materials a given library owns. Other CBA studies have been conducted in other areas, including periodical selection (Johnston, 1990); school library media centers (Ekhaml, 1992); digital library projects (Byrd, 2001); and electronic information (White and Crawford, 1998).

CBA is not the only approach to pricing. Shelia Anne Elizabeth Webber (1998) cites other approaches in her article, "Pricing and Marketing Online Information Services." There are multi-part pricings, especially for online services; these include Dialog's Dialunit, (a pricing mechanism that recalls per-search charges and charges for Central Processing Unit (CPU) time). Vendors play a part in this activity, and often Webber feels that the increased sophistication of using price as a part of the marketing mix rather than in economic terms could make prices of online services more rather than less difficult to compare and evaluate.

Place

Place, or distribution, refers to how the library gets its product to the customer. Is it through a branch library, remote site, online? Where should the service be provided? Where should it be located in the library? Which library? Who should be included in that place? Place decisions must be based on an understanding of library and/or organizational goals which stem from its mission statement, and on user wants and needs.

Abigail Ayers Van Slyck (2001, 519), in her essay "The Librarian and the Library: Why Place Matters," states that the term "library" for some has become a synonym for the phrase "moribund storehouse of

outmoded information.” There are other nineteenth and twentieth century connotations, in which place meant “closed stacks,” and other connotations where with specific ethnic groups, “place” meant being left out until recent legislation removing discrimination in public places. These and other reminders remain with us in terms of the library as place. As these images change, some of the concerns remain.

In recent literature, for example, there are many new definitions of the library as place and there are new twists on old images. Take, for example, the literature that deals with the library as not a moribund place but a virtual place (Anderson, 2001; Burke, 2002; Novak, 2002); virtual reference services (Roberts, 2000). Then there are those concerned that the library remain a place where diversity occurs (Simmons-Welburn, 1999; Lembeck, 1998); and those who maintain interest in the library as place where other marginalized populations are included, for example, to the homeless (Grace, 2000; Kuehn, 1990). Others share concern that in the progress afforded by technology that the have-nots of technology be included in the function that the library as place holds (Gates, 1996; Howland, 1998; Morehead, 2000; Schuman, 1992). Still others are concerned that the library remain a place to think, explore and grow (Reynolds, 1999).

Promotion

Promotion is the communication and public relations aspect of the marketing mix that informs the public about the product’s benefits and applications. Promotion consists of five basic tools: advertising, sales promotion, public relations, sales force, and direct marketing. Public relations, like sales promotion, represents another set of tools and can be classified under the acronym PENCILS. PENCILS represents publications, events, news, community involvement activities, identity media, lobbying activity, and social responsibility activities (Kotler, 2000, 110-111). Although this is the largest single representation of articles in the literature, these articles may not necessarily be on target regarding the true meaning of this aspect of marketing. This is especially true since to accomplish this aspect of the marketing mix one needs to conduct market research (Le Beau, 1999).

Market research is the mind set of marketers and consists of five basic steps that can be represented as:



R = Research (i.e., Market research)

STP = Segmentation, Targeting, and Positioning

MM = Marketing Mix (popularly known as the 4 Ps—product, price, place, promotion)

I = Implementation

C = Control (getting feedback, evaluating results, and revising or improving STP, Strategy and MM tactics. (Kotler, 2000, 31)

Kotler's explanation of market research used to achieve effective communication and public relations about a product, is often a very detailed and thorough aspect of marketing. Segmentation has long been a part of the marketing used in libraries since the late 1800s and the early 1900s. It has been used to create new organizational structures within the American Library Association and in creating different types of user services within libraries.

Market segmentation to achieve market research goals may occur in many different ways. Some of these examples may be found in LIS literature as well as in traditional marketing literature. Strauss (1988, 127) lists some of these ways as follows: (1) Geographic, (2) Demographic (age, gender, income, occupation, nationality, race, religion, education, etc.), (3) Psychographic (social class, lifestyle), and (4) Behavioristic. Market segments are also created based on several assumptions:

1. The persons in the segment have similar needs to fill.
2. The persons in the segment will respond.
3. The market segments created can be contacted or reached efficiently and economically.
4. The persons in the segment have the resources to purchase (if needed) the product or service.
5. The product being marketed will fill the needs of the persons in the segment.

Kotler (2000, 26-27) adds that a company can slice the market into finer and finer "segments" and that we can distinguish three levels of market deconstruction: the brand segment level, the niche level, and the market cell level. The brand segment level may include such divisions as: benefit segmentation, occasion segmentation, usage level segmentation, and lifestyle segmentation. The niche level typically describes smaller sets of customers who have more narrowly defined needs or unique combinations of needs. The market cells level addresses instances where a company or organization wants to identify even smaller groups of customers who share characteristics that provide a market opportunity.

One might ask in this regard: How is segmentation represented in LIS literature? First, it should be understood that it is under the rubric of “market segmentation” that the library staff may realize that no one library can be everything to everyone! It is also a way for different types of libraries to address the need to use different characteristics to define major user and non-user segments. In the literature of LIS there are only a few references specific to market segmentation, “Market Segmentation: Some Implications for Library Programmers: Instruction in Online Catalogs,” (1988) and “Labor Market Segmentation and Library Salaries: Data Drawn from the Career Profile of ALA Personal Members,” (1987), and then there is reference to this process in Darlene Weingand’s (1998, 47-8) reference to market segmentation appropriately related to the marketing audit. It is also in the promotion aspect of the marketing mix where controls (or means of evaluation) appear. This is another area where there are few articles.

Weingand (1998, viii) modified the four Ps to accommodate part of this problem for libraries. She added two more Ps: Prelude (to accommodate the marketing audit) and Postlude (to place emphasis on the need for evaluation). But again, in terms of representative literature, there are very few articles on the evaluation of marketing, particularly as it relates to the promotion function. One specific work that deals with promotion evaluation is a thesis “Marketing the Corporate Library: Measuring Effectiveness with Emphasis on Promotion via E-mail; Results from a Corporate Library Survey,” written at University of North Carolina-Chapel Hill by Pamela Aubuchon-Fields (1995).

MARKETING PRINCIPLES APPLIED IN LIS

It appears strongly from the literature that the best examples of market research in LIS are in the area of “usability testing” (Noble, 1996) and in Human Computer Interaction studies (Dillon, 1997). Usability testing means that products should be tested: (1) before they are built, (2) after they are built but before they are released, and (3) after they have been in the market long enough to have been used for a reasonable length of time by customers. There are economic as well as service perspectives to this phenomenon. Such testing will add to the cost, but it is less expensive over the long term to get feedback during each of the three stages of a product’s life cycle than to rely on the “trial and error” method depended upon as far back as the agrarian societies of early human civilizations. Goals of usability testing often include some varia-

tions of (1) usefulness, (2) effectiveness, (3) learn-ability, and (4) user satisfaction.

Usability testing started out as a business marketing term that is often neglected, in both business and LIS terms. Noble (1996, 272) states that "sitting potential customers down in front of an interface for an online or CD-ROM product, watching them try to use the product in an environment that simulates the real world, and making the appropriate adjustments to a product before it is released can save hundreds of thousands of dollars in cost, and increase sales dramatically."

It should be noted however, that usability testing involves more than testing an interface. Regarding Human Computer Interaction (HCI), Andrew Dillon (1997, 965) in his introduction to a Special Topic Issue: Current Research in HCI, writes: "It is not easy to give a concise definition of this subject; it is part behavioral science, part design. It contains elements of both Computer and Cognitive Science, and it seeks to understand users at the individual, group and organizational level." Some literature will offer substantive assistance. A how-to guide for testing web sites by Elaina Norlin and CM! Winters (2002) is one such attempt. They cite reasons for testing, basics of good web design, getting buy-in and planning for the web usability test, gaining effectiveness, and examples of a web usability test from start to finish. Actual testing appears in "Usability Testing and Students with Visual Disabilities: Building Electronic Curb Cuts into a Library Web Site" (2001); "Usability Testing and Libraries: The WSU Experience" (2000); "Usability Testing at the University of Arizona Library: How to Let the Users in on the Design" (2000); and an excellent article on information retrieval and relevance assessment, "Searching for Information: Applying Usability Testing Methods to a Study of Information Retrieval and Relevance Assessment," by Theresa Anderson (1999).

Generally, however, as shown earlier, the majority—70% of the marketing articles in 1990-1995—were indexed under promotion and public relations, and in 1996-2001, when there was an increase of articles in this area, the percentage rose to 72% of articles indexed under the term marketing. Since promotion (and public relations) are only a part of the marketing mix, there is a disconnect between these two entities and marketing. More of a problem is the fact that little has changed in the representation of marketing literature in LIS since the 1980s save the increase in percentage of articles. Daniel Carroll (1982) referred to the vast amount of articles on promotion (as marketing) as "passive marketing," although Blaise Cronin (1982) believed that when LIS professionals used

marketing (or those aspects of marketing) to communicate awareness of its services to a broad user base, they were being proactive.

Next to usability/human computer interaction studies, the second group of most potentially effective studies are case studies. One way of dividing the remaining articles that are not on promotion and public relations is not to decide whether they were “passive” or “proactive” means of marketing, but better to place them in categories consistent with marketing practices. Therefore, the following two categories were used: (1) marketing principles being applied originally to libraries, and (2) marketing principles being applied to existing practices/products/services. Marketing principles being applied originally to LIS make up the case studies. One of these examples includes a special issue of *Library Trends* edited by Darlene Weingand (1995). In that issue Duncan Smith in his article, “Practice as a Marketing Tool: Four Case Studies,” discusses the creation of a new service, the redesign of a service, and a case where a librarian who is hired temporarily as a corporate librarian with specified time to prove her worth to the organization, markets herself and her LIS skills to the point where over a period of time, she not only proves her own worth and skills to the corporation, but builds the library staff to a full fledged staff of fourteen LIS professionals, fourteen years later.

Still another example from Smith’s article is that of Virginia Rankin, whose case involves a behavioral aspect of customer use. She observed that students copied from encyclopedias rather than developing and expressing ideas in their own words. By rejecting the commonly held assumption that students were using encyclopedias because they are lazy, she postulated that students were using encyclopedias because they could not distinguish between useful and irrelevant information. She conducted interviews with the students and as a result of those interviews learned that students lacked a framework for specific research assignments. She taught the students differently, and research, thereafter, was not a time-consuming and boring process—something more suited for photocopiers; rather research became an entity that was personally relevant, efficient, and fun. Other uses of the case study approach may be found in Keith Hart’s (1999) use of hypothetical case studies for LIS application in his *Putting Marketing Ideas Into Action*.

A good example where some aspects of marketing become influential may be found in the article “Marketing Electronic Resources and Services (Hart, Coleman & Yu, 2000). In this instance, due to a lack of marketing, faculty unknowingly were buying resources that the library had already purchased. In addition to not knowing that these materials

existed, they did not have time to go to the library, nor did they know how to use the materials. To help prevent this from happening with students too, the faculty and library staff worked together using marketing skills to the benefit of all-faculty, librarians, and students.

Another case where marketing was applied to an existing product or service is Mollie D. Lawson's (2000) "Reaching the Masses: Marketing a Library Instruction Course to Incoming Freshman." Before Lawson's work, there was very little literature on this topic save Thesing (1985) and Kirkendal (1985), and more recently Weaver (1997), related to the marketing of library or bibliographic instruction.

An unusual (to the literature) instance of the use of marketing being applied is Bonnie McCune's (2000) article, "Marketing to Find Volunteers." Here, the author focuses efforts and attention on the 4Ps (Product, Place, Price and Promotion) to develop a more staff-efficient process. The marketing construct helps her to focus on volunteers as individuals addressing such questions as their needs/wants, and helps focus organizationally as well: What are the library's needs and wants? This application of marketing to staffing needs might also present an opportunity where LIS may begin to think more broadly in terms of applications, and on different types of approaches as well.

RELATIONSHIP MARKETING

Given some of the criticisms made of marketing including its inappropriateness professionally for LIS (Govan, 1988), such use may result in the loss of needed services (Jennings, 1984), since librarians do not market and never have marketed (White, 1997). These criticisms however, present an opportunity for seeking new ways of handling this managerial function in LIS. Consider, for example, a type or subset from the marketing continuum as a possibility, one that some believe to be more appropriate for a service profession like LIS than for traditional marketing models. Larry X. Besant (2000) proposes Relationship Marketing for libraries, since other businesses like Mary Kay Cosmetics, Harley Davidson Motorcycles, and others have switched from traditional marketing methods to Relationship Marketing. Moreover, as a lead article in the *Harvard Business Review* reports:

Relationship marketing is in vogue. Managers talk it up. Companies profess to do it in new and better ways everyday. (Fournier, Dobscha, and Glenn, 1998)

Relationship marketing is defined by Tony Cram (1994) as the consistent application of up-to-date knowledge of individual customers to product and service design, which is communicated interactively in order to develop a continuous and long term relationship which is mutually beneficial. To help distinguish relationship marketing from traditional marketing, Besant (2000) cites the definition of marketing by the American Marketing Association, which defines marketing as the process of planning and executing the conception, pricing, promotion, and distribution of ideas, goods, and services to create exchanges that satisfy individual and organizational objectives. Adrian Payne (1995), a relationship marketing pioneer, distinguishes traditional marketing and relationship marketing in this manner: the elemental differences, he states, is that traditional marketing has been about getting customers. Relationship marketing addresses the twin concerns—getting and keeping customers. This difference may be expressed in terms of the traditional business model as repeat customers. But relationship marketing goes beyond the “repeat customers” concept to the “life long learning” concept and beyond.

If the question were asked: why has LIS not jumped on the bandwagon of relationship marketing? Besant (2000) reports that libraries may not yet have “got it” about traditional marketing (represented by the misunderstandings in the literature), and therefore, neither have they understood the newer models that may be more appropriate. Relationship marketing is the ongoing process of identifying and creating new value with individual customers and then sharing the benefits from this over a life-time of association. It involves the understanding, focusing, and management of ongoing collaboration and sharing through interdependence and organizational alignment.

No matter how one views the concept of the marketing continuum, there are certainties regarding the fragmented use of marketing in the literature. LIS has, like businesses, misunderstood marketing, represented by such an overabundance of literature focusing on promotion and public relations, only one part of the marketing mix. In order for LIS to meet organizational goals and place customers at the center of the organizations, some changes are needed. Clearly, traditional marketing and relationship marketing are linked through the management principles that have preceded them. Peter Drucker says that we should place our efforts where we wish to get results. Relationship marketing affords the opportunity to place our resources (money, time, efforts, and resources) on the relationships that are more important and/or more capable of providing beneficial change.

CHANGE MANAGEMENT

Change is the only constant in the universe and has been and continues to be prevalent in libraries. S. R. Ranganathan (1963, 326) wrote in his famous *Five Laws of Librarianship*:

The fifth law is: A library is a growing organism. It is an accepted biological fact that a growing organism alone will survive. An organism which ceases to grow will petrify and perish. . . . A growing organism takes in new matter, casts off old matter, changes in size and takes new shapes and forms. Apart from sudden and apparently discontinuous changes involved in metamorphosis, it is also subject to a slow continuous change which leads to what is known as a variation, in biological parlance, and to the evolution of new forms. This change is a slow but effective process that the protagonists of evolution assert that is the shapeless undifferentiated protozoa of the Paleozoic age that has transformed itself, by successive stages of variation, into the most differentiated specimen of creation—the human being. The one thing that has been persisting through all those changes of form has been the vital principle of life. So it is with the library.

A change in paradigm is needed, a change from fragmented marketing to understanding that marketing is a mind-set, a philosophy and a responsibility of management, and that change relative to either full-fledged marketing as it is traditionally seen, or to the use of a particular type of marketing is needed specific to LIS.

Unfortunately, POSCORB provides the context for marketing and planning to be accepted as one combined entity, and as one of the functions of a manager, but POSCORB does not provide the mechanism for dealing with change. Jeanie Daniel Duck (1993, 109), writing in the *Harvard Business Review* states that, “the problem for most executives is that managing change is unlike any other managerial task they have ever confronted. One CEO at a large corporation told me that when it comes to handling even the most complex operational problem, he has all the skills he needs. But when it comes to managing change, the model he uses for operational issues doesn’t work.”

What then, are some of the theoretical underpinnings, metaphors, and strategies that managers can use? Duck also states that often managers make the mistake of using mechanistic managerial models for change when what they need is a mental model of change. Mechanistic

models, like those of F. W. Taylor in *Scientific Management* used for managing physical work, are not fit for superimposing on a mental model needed for change. With change, he says, the goal is to teach thousands of people how to think strategically, and how to recognize patterns and anticipate problems and opportunities before they happen. Invariably, what needs to be managed is the “dynamic” not the pieces.

The issue of managing the dynamic is a pattern in much of the literature of change management, so much so that Eric Abrahamson has coined the term “dynamic stability” to help identify the era of rapid changes in technology within traditional bureaucratic organizations. A bureaucracy that is needed for its strength in accountability but needs better understanding and application in terms of understanding hierarchy. By “dynamic stability” Abrahamson (2000, 76) says that organizations have to change to stay alive, but change does not have to be so painful and stressful. At its center is a process of continual but relatively small change efforts that involve the reconfiguration of existing practices and business models rather than the creation of new ones. His model also calls for the “pacing” of big and small changes implemented at the right intervals, and the use of tinkering (pulling together inspired solutions to problems) and kludging (tinkering on a larger scale involving many parts). One of the data collection techniques useful for LIS professionals is the Pareto Chart. Pareto charts, used to establish priorities, are described by Mary Walton (1986, 105) as a way to sort out the “vital few” from the “trivial many.”

Change Management and Information Services (Pugh, 2000) emphasizes the importance of team work in change management and the concept of the learning (and listening) organization, where all participants are players and contributors to change, as by far the best approach to change management.

CHANGE THEORIES

Change can be addressed from many angles or viewpoints based on the fact that there are several aspects of change including the environment or culture where change needs to take place, the perceived and actual benefits of the change, the interpersonal or interactive aspects of change, and the change process itself. Various theories are instructive to this process, Social Cognitive Theory or Social Learning Theory, and Paradoxical Theory of Change, to name a few examples. Some change theories refer to the personal or interpersonal aspects of change while others refer to the organizational dimensions of change.

The Paradoxical Theory of Change (Beisser, 2002) which underlies the work of gestalt therapist Frederick Perls says that "change occurs when one becomes what he *is*, not when he tries to become what he is *not*. The Gestalt therapist rejects the role of "changer." His/her strategy is to encourage, even insist that the patient *be* where and what he is. Change does not take place by trying coercion, or persuasion, or by any insight or interpretation, or any other means. Rather, change takes place when the patient abandons, at least temporarily, what he would like to become and attempts to be what he is. The premise being, that one must stand in one place in order to have firm footing to move and that it is impossible to move without that footing. A further application of Paradoxical Change Theory is that the individual is a microcosm for the social system as well.

Gervase R. Bushe (1998) describes different ways in which we may think about how an "appreciative inquiry" can create change in social systems. Appreciative inquiry is a form of action research that attempts to create new theories/images/ideas that may assist in the developmental change of a system (Cooperrider and Srivastara, 1987). One approach is in changing the organization's "inner dialogue." Changing an organization's inner dialogue is based on the premise that an organization, as an individual, have layers of awareness. The major layers are the "rational mind" and the "inner dialogue." The rational mind of an organization is expressed in official meetings, workshops and retreats. The "inner dialogue" which happens in smaller groups or in confidential conversations. These "inner dialogues" often entail interpretations and judgements about the events that this group would probably not discuss in official forums. The Appreciative Process can be changed by changing the stories of the inner dialogue. How can this happen? Through the collection of stories produced, for example, from interviews from a criticism of the lack of leadership of the organization. The interviewer might ask of the executive, "Tell me about your most courageous act." Often, such a question will generate new information that the inner circle had not known and, in turn, his/her attitude about the lack of leadership is changed. Another example in the literature references the establishment of effective teams, where the stories of when a team structure worked best would be used by those wishing to establish effective teams. Another aspect of the Appreciative Process being used to create change is to pay attention to what you want more than paying attention to problems, many of which are associated with the rapidity of change in the Information Age.

With the rapid acceleration of change it is crucial that an orderly method of change be found. Because the principles that are relevant for individual change are also critical to social and organizational change, lack of integration can present a threat to society just as the individual presents an individual threat to him/her, the same is true of society. The compartmentalization of old people, young people, rich people, poor people, black people, white people, academic people, service people, etc., each separated from the others by generational, geographical, or social gaps, is a threat to the survival of mankind. We must find ways of relating these compartmentalized fragments to one another as levels of a participating, integrated system of systems.

CONCLUSIONS

Since there are so many misunderstandings about marketing in LIS, there is fragmented use of the concept, and there are some who have argued the inappropriateness of marketing for LIS. Does this mean that all the efforts in marketing in LIS have been for nought? This author thinks not. Much good has been accomplished, but there is a need for acknowledging the misunderstandings and seeking new ways of changing what needs to be changed while keeping that which is effective and then constructing a “whole” that is more representative of the LIS profession and of marketing as a discipline.

There is a rather significant assumption in marketing: people with similar motivations can agree on mutual beneficial partnerships that will advance a shared interest. This assumption seems to have been borne out in some of the marketing cases discussed above. Many old assumptions were challenged to the benefit of LIS staff, faculty, students, and administrators. The full application of marketing in libraries however requires change.

While the case study method has provided rich experiences for those who have chosen to be bold, one of the strengths of the usability study is that we are able to combine other aspects of the marketing mix—in particular, cost benefits. Second, these studies help to show what is often said of the strategic planning/marketing construct—the process is as important (if not more so) than the plan itself. In this instance we are compelled by structure to involve users who are the determinants of the success (or lack thereof) of what we do, and why we do it.

Third, the increase in use of technology as a whole provides new opportunities, services, products, and communication devices that have

never been experienced to this degree in the history of the LIS community. These opportunities deserve to be exploited more fully. Finally, since change is needed, the use of change theories and change management are important aspects of improving the use of marketing in LIS, especially given the benefits that marketing can make to LIS. Marketing helps to demonstrate the value of LIS to its users. Marketing helps an organization see the big picture (rather than isolated pieces), marketing helps to build user allegiance, respect and trust. Marketing also helps gain organizational support, enhance the visibility of libraries and other information agencies, build market share and shape public perception. Last, but by far, not least, marketing engenders successful fund-raising and accountability. We should (and can) meet this challenge.

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